

Navigating in Oracle

Scope

To use SFA FMS productively, you need to understand the various components of a window, the menu paths and the keystrokes. These are necessary to access and navigate within the system to perform your various job tasks.

System References

N/A

Policy

N/A

Responsibility

All Users

Distribution

Ownership

N/A

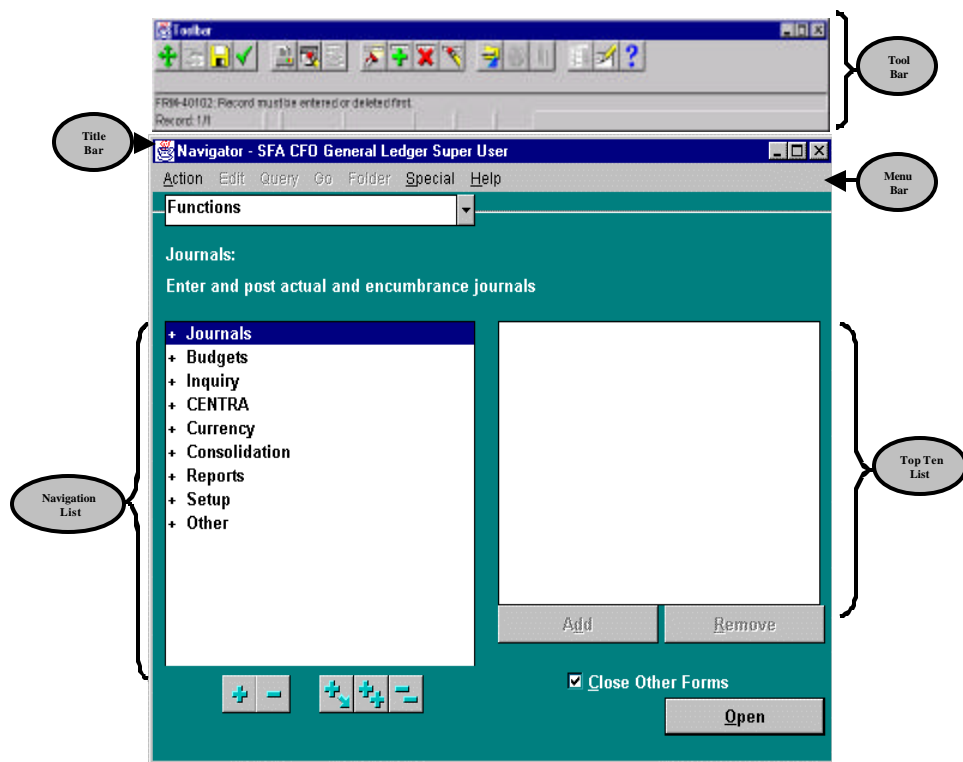
Activity Preface

Navigator Window

Each time you sign-on to SFA FMS, the **Navigator** window will appear. This window is the starting point for navigating throughout the system and accessing the windows and information needed to perform various job tasks.

The items that appear on the Navigator window will vary based on the responsibility that you selected at sign-on; however, the basic format and features of the Navigator window will remain the same. The key features are:

- Title Bar
- Menu Bar
- Navigation List
- Top Ten Navigation List
- Tool Bar



Title Bar

The Title Bar appears at the top of every window in SFA FMS. It displays the title, or name, of the window. On the Navigator Window, the title bar also displays the name of the responsibility that you selected at sign-on.

Menu Bar

The Menu Bar appears beneath the title bar on every window in SFA FMS. It contains pull-down menus of commands that enable you to perform actions in the system.

Navigation List

The Navigation List displays the windows that can be navigated to and business functions that can be performed with the selected responsibility. This list will vary based on the responsibility that you selected at sign-on.

To open an item on the Navigation List, either:

Click the item and then click the Open button

-OR-

Double-click the item

FYI: The + sign that appears to the left of items on the Navigation List indicates that sub-items exist below that item. Expand or collapse these items using the expand and collapse buttons at the bottom of the list.



Navigation Top Ten List

For windows used frequently, add them to the **Navigation Top Ten List** located on the right side of the Navigator window. The top ten list displays a shortcut to frequently used windows numerically so they can be chosen instantly without having to search for them in the Navigation List. The Top Ten List is unique for the responsibility and User Name combination used at sign-on. Therefore, a different Top Ten List can be created for each responsibility.

To add an item to the Navigation Top Ten List:

Click the item on the Navigation List

Then, click the Add button 

To remove an item from the Navigation Top Ten List:

Click the item on the Navigation Top Ten List

Then, click the Remove button 

To open an item using the Navigation Top Ten List:

- Click the item on the Navigation Top Ten List and then click the Open button 

-OR-

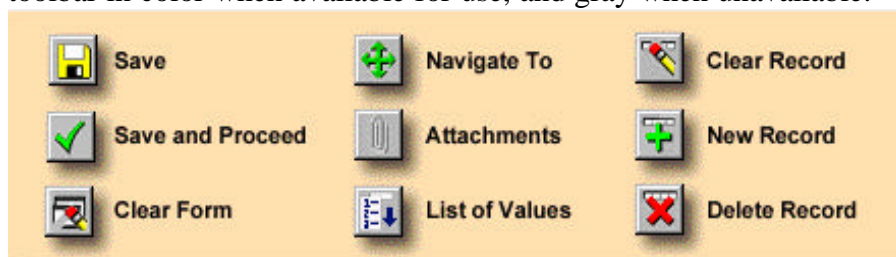
- Double-click the item

Toolbar

The **Toolbar** window displays shortcut icons to the most commonly used menu commands. Additionally, the message line at the bottom of the toolbar displays pertinent information regarding the status and processing of the windows and records including error messages. The Toolbar window appears automatically at the top of the Navigator window after sign on to SFA FMS. The toolbar window can be reduced to an icon on the bottom of the screen by using the Minimize button. To see the Toolbar again, simply click on the Toolbar icon to maximize it.



The following icons appear on the toolbar. The icons appear on the toolbar in color when available for use, and gray when unavailable:



Save: When you save your work, SFA FMS updates the database with the work that you have done since you last saved your changes. A message will appear on the message bar informing you that the transaction is complete.

Save and Proceed: The Save and Proceed icon saves any pending changes and prepares the window for the entry of a new record.

Clear Form: The Clear Form icon clears all data in the current window.

Navigate To: The Navigate To icon returns you to the Navigator window.

Attachments: The Attachments icon opens the Attachments window.

List of Values (LOV): The List of Values icon shows the list of values for the current (selected) field. The LOV feature is useful when entering data in SFA FMS. It provides you with a powerful, easy-to-use data entry method that increases your accuracy and productivity. The LOV icon illuminates on the toolbar when a list of values exists for the current field. By using the LOV, you can choose data from an online list of valid input choices. Once you choose a value, the List of Values window closes and inserts the value into the current field.

Clear Record: The Clear Record icon clears all data pertaining to the current record in the window.

New Record: The New Record icon creates a new record.

Delete Record: The Delete Record icon deletes the current record from the database.



Edit: The Edit icon opens the Editor window for the current field. You can display an Editor window to view, enter or update the entire contents of a text field. This window is useful for editing scrollable text fields. If the current field is a display-only field, then the Editor window appears in a display-only mode. You can also use the Editor window to search for a phrase and replace it with another phrase.

Window Help: The Window Help icon displays general help for the current application.

Find: The Find icon displays the Find window to search for data within a field.

Responsibility: The Responsibility icon displays the other responsibilities that you have access to and enables you to log on using a different responsibility.

Translations : The Translations icon opens the Translations window.

Zoom: The Zoom icon invokes a defined zoom and goes to that form.

Print: The Print icon prints the current window to your assigned default printer.

Folder Tools: The Folder Tools icon displays the folder tool palette.

Summary/Detail: The Summary/Detail icon switches between the summary and detail views.

Basic Terminology

Listed below are some basic terms that are used throughout this guide to refer to elements of the SFA FMS system. It is important to be familiar with the meaning of these terms in order to follow along in the guide.



Field -

An area in a window that displays data or enables data entry. Fields that allow data entry appear outlined in black.



Icon -

A graphical element that serves as a shortcut to initiate a menu command. Icons usually appear on the Toolbar.



Button -

A graphical element that initiates a predefined action when you click it.



Scroll Bar -

A graphical element that enables you to reposition the screen display.



Check box -

An box that enables a selection of an option.

Keyboard Shortcuts

Many of the tasks that you can perform using the menu bar or toolbar can also be performed using a keyboard shortcut. Some of the most commonly used keyboard shortcuts are listed below:


[Ctrl] + [S]	Save
[Ctrl] + [L]	List of values
[F6]	Clear record
[F8]	Clear form
[F11]	Enter query
[Ctrl] + [F11]	Execute query
[F12]	Count query
[Shift] + [Ctrl] + [E]	Display error

FYI: To learn more keyboard shortcuts, you can select Keyboard Help from the Help menu or press CTRL + K on your keyboard. This option

displays the current mapping of specific functions and menu commands to the keyboard.

Creating Customized Folders

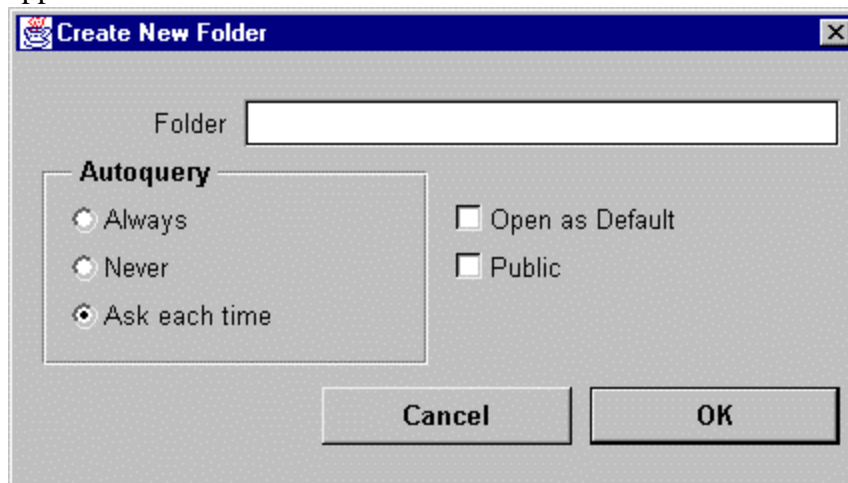
A **folder** is a customized layout of the fields on a window. Creating a customized folder allows you to decide what information is most important for you to see on your window and the most useful order for that information to be displayed.

Folders can be created on windows that show an **Open Folder** icon  in the upper left-hand corner of the window. When a folder is in use, the Open Folder icon is followed by the title of the folder.

To create a folder:

Identify that the **Open Folder** icon is available on the window in which you would like to create folder.

Select **New** from the **Folder** menu. The “Create New Folder” window appears.



To customize the new folder:

- Name the Folder
- Choose an **Autoquery** option

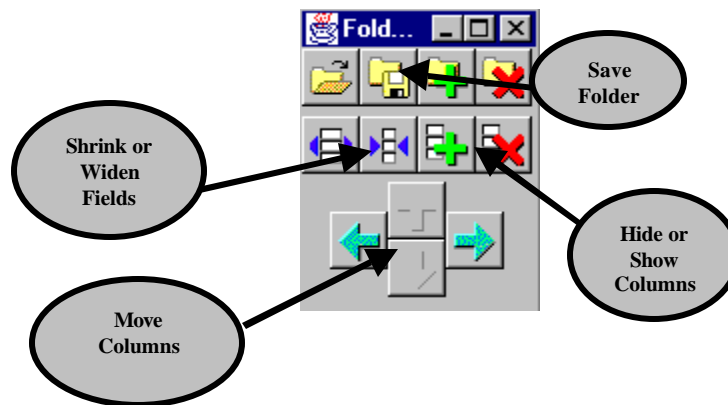
Always: The window containing the folder will load data on the window each time it is accessed. If multiple records exist in the system, this option

will make the processing slower. If this option is selected, you must specify the query criteria.

Never: The window containing the folder will not load data each time the window is accessed. The user can query to find records on the window. For timely results, this option is recommended.

Ask each time: This option prompts the user each time the window is accessed to choose a query option.

- Click the **Open as Default** box to designate the folder as your default folder. The default folder will appear automatically each time you access the window.
- Click **Public** if you want all users to have access to the folder.
- Click **OK** after customizing the new folder. The window appears showing the new folder followed by the title.
- Select **Folder Tools** from the **Folder** Menu
- Use the **Folder Toolbar** to customize the window
- Select **Save** folder from the **Folder** menu.



End of activity.